



Partnering and Leadership Successes

How to Make More Mortgages A PALS Workshop for Credit Unions

June 2, 2004

Westin Copley Place, Boston, Massachusetts



This free workshop is co-hosted by the National Credit Union Administration, in conjunction with the Massachusetts, New Hampshire, New York, and Rhode Island Credit Union Leagues, the National Association of Federal Credit Unions, and the National Federation of Community Development Credit Unions.

8:00 a.m. *Continental Breakfast / Registration / Networking*

8:45 a.m. *Welcoming Remarks*

- ✦ **Debbie Matz, Board Member, National Credit Union Administration**
- ✦ **Dan Egan, President, Massachusetts, N.H. & R.I. Credit Union Leagues**

9:00 a.m. *Helping More Members Realize the American Dream – Credit Union Innovations*

Facilitator: **Jim Blake, CEO, Harbor One Credit Union, Brockton, Mass.**

- ✦ **Mark Gregory, VP-Lending, The Summit FCU, Rochester, N.Y.**
- ✦ **Fred Healey, CEO, Workers' Credit Union, Fitchburg, Mass.**
- ✦ **Gordon Simmons, CEO, Service Credit Union, Portsmouth, N.H.**
- ✦ **Caryl Stewart, CEO, Vermont Development Credit Union, Burlington, Vt.**

10:30 a.m. *Break*

10:45 a.m. *Managing Mortgage Lending Risks*

Facilitator: **Fred Becker, President, National Association of Federal Credit Unions**

- ✦ **Todd Hempstead, Managing Director-Structured Transactions, Fannie Mae**
- ✦ **Emily Hollis, CEO, ALM First Financial Services, Dallas, Texas**
- ✦ **Lou Jennings, EVP-Mortgage Lending, Navy FCU, Vienna, Va.**
- ✦ **Dave Marquis, Director, NCUA Office of Examination & Insurance**
- ✦ **Robert Petersen, Senior Account Manager, Freddie Mac**

12:30 p.m. *Networking Lunch*

Luncheon Speakers:

Nelson Merced, Director-National Initiatives, Neighborhood Reinvestment Corp.
Felix Torres, Executive Director, Manchester Neighborhood Housing Services

1:45 p.m. *Resources, Support and Partnering Opportunities*

Facilitator: **Bill Mellin, President, New York State Credit Union League**

- ✦ **Joe Brancucci, Chief Lending Officer, Boeing Employees CU, Tukwila, Wash.**
- ✦ **Sandy Burky, Senior Mortgage Consultant, National Federation of CDCUs**
- ✦ **Bruce Croteau, SVP-Community Outreach, St. Mary's Bank CU, Manchester, NH**
- ✦ **Susan Elliott, EVP-Member Services, Federal Home Loan Bank of Boston**
- ✦ **Richard Maxstadt, Senior VP/COO, CUC Mortgage Corp., Albany, N.Y.**

3:15 p.m. *Concluding Remarks*

This workshop is intended to educate credit unions on how to make more mortgages safely and effectively. NCUA, as a government agency, does not imply endorsement of any products or services offered by the panelists.